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Panoramic Software, Inc.

VetProWeb – Veteran Case Management System : User Training Guide for New User Interface

Section	Description	

VetProWeb User Training

VetProWeb – Typical VSR Work Flow

The typical work flow for the case where a veteran requires a new VA Form to be completed and filed with the VA will be similar to this:

1. Reception: The veteran is greeted and entered into the Reception Queue. If the veteran's record already exists in the database, the VSR helping the veteran is taken to that record. If the veteran is not already in the database, a new record is created during the Reception process.

2. Interview: The veteran is helped by a Service Officer, who "selects" the veteran from the Reception Queue and is "taken" to the Veteran Demographic screen. If necessary, new demographic information is entered on the demographic page. Dependents (spouse and children) may be entered at this time.

3. VA Form: The Service Officer assists the veteran while the primary VA Form is completed. The Form is selected from the VA Form/Claim Activity page. This will automatically create a Claim Activity record behind the scenes which will be linked to the saved VA Form.

4. The VSR may visit (edit) the Claim Activity screen to select Claimant (dependent), set the Diary Date, enter College information, etc.

5. Add attached documents (scans) to the Claim Activity.   In most cases the primary VA Form will include supporting Forms that will be filled in at the same time. In some cases the VSR may select and fill in additional forms. These forms may be printed, scanned and attached to the Claim Activity also.

… And possibly at some later time:

6. Print a Diary (Tickler) Report that includes this Claim Activity.

7. Visit the Claim Activity screen to View the associated VA Form.

8. Open the veteran's record and enter a Case Note documenting new activity on the case.

9. Edit the Claim Activity screen to update Claim status or enter Award information.

The remainder of this Training Guide will cover each element of the Work Flow listed above.

The Reception Queue

VetProWeb has been "upgraded" to provide San Bernardino with capabilities similar to those in VCMS. This section describes the new Reception Queue functionality:

View of the Queue

The user will be taken to the Reception Queue grid immediately after logging in. It looks like this:

Reception Queue									
Filter Visit Status Column	Date Filter 06/12/2013	View San Bernardino	Insert						

1 - 4 of 4   First Page | Previous | Next | Last Page

		Visitor Name	Veteran Name	Arrival Time	WaitTime	Reason	Time Seen	Seen By	Time Completed	Visit Status
☐		mickey mouse	mouse, mickey	08:23 AM	2918	TEST				5 Waiting
☐		Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
☐		Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
☐		Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

1 - 4 of 4   First Page | Previous | Next | Last Page

Interview	Seen By	Completed	Reset to Waiting	Vet Discovery	Veteran Visit Log

The [View] will be for the office at which the logged in user normally works. The Reception Queue for other offices or all offices is also available. The default sort order is by the [Visit Status], organized so that the clients waiting for service are at the top of the list.

The Reception Queue grid will contain a record for each visitor entered during the current day. Previous days may be included by changing the [Date Filter] value above the grid.

Inserting a new Visitor Record into the Reception Queue:

To insert a new visitor the user clicks on the [Insert] button at the top right of the Reception Queue grid:

A new Visitor record will open:

[Visitor Last Name] Validation:

The [Visitor Last Name] field label is red indicating that a visitor last name must be entered for the record to be saved. When the last name has been entered, the [Save] buttons will become active.

The [Visitor Relationship] is a drop-down:
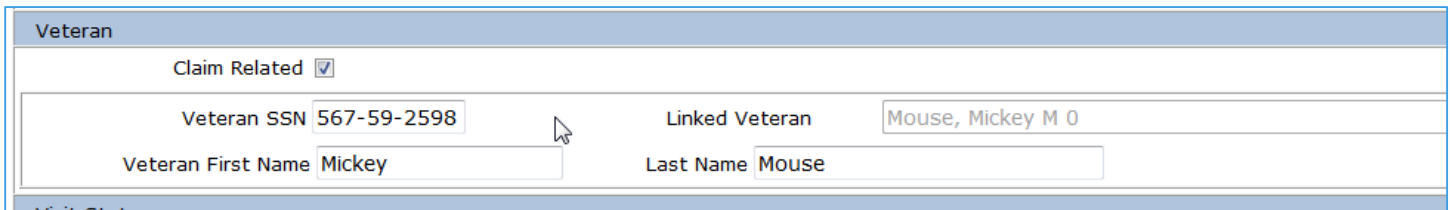
The value of [Claim Related] defaults to checked as shown. Veteran identification fields are shown.

Linkage to a Record in the Veteran Table:
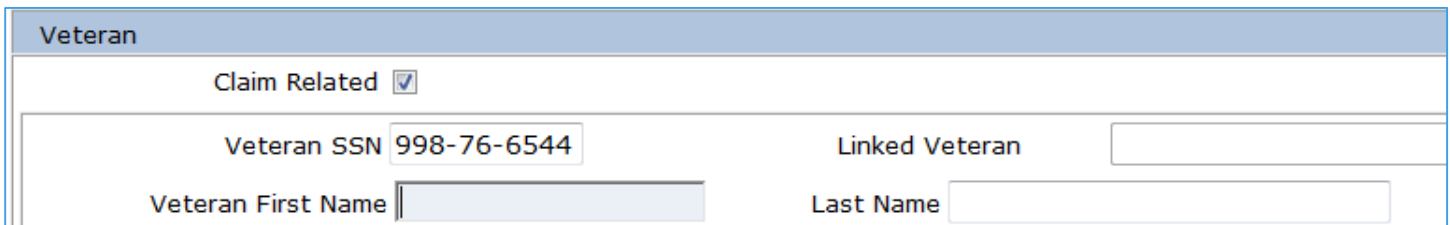
When [Veteran SSN] data is entered, the application determines if there is a match in the database. If there is a match, when the user tabs out of the SSN field, the Linked Veteran name is shown and the Veteran Name fields are filled in.

The Veteran Name fields on the Visitor record are updated with the values of those in the veteran database table.

If there is not a match with the Veteran SSN in the database, no action is taken after leaving the [Veteran SSN] field, but the User is alerted that both first and last names for the veteran must be entered in addition to the SSN for a new veteran record to be created.
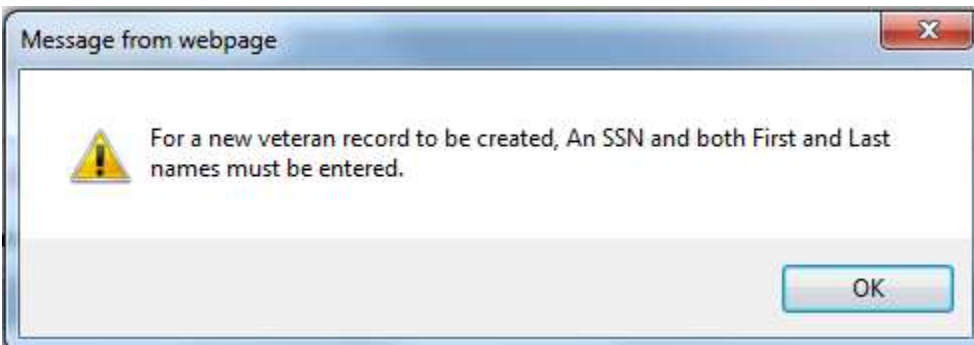
When there is no SSN match, the user may **cause** a new veteran record to be created by entering both veteran's First and Last names. Upon leaving the [Last Name] field, another attempt is made by the application. If there is no match to the Veteran SSN in the database *and* there has been data entered for *both* the first and last names, a new veteran record (folder) will be created. On return, the Linked Veteran field will be displayed to confirm there is a veteran folder.

If either the veteran is found or a new veteran record is created, the veteran SSN field is disabled from further editing.

Other Information Requested by the Visitor:

When the visit is "Claim Related" (the default) you will see the veteran information entry fields as described above:

However if you un-click the "Claim Related" checkbox, the veteran entry fields are hidden and a section many current VetProWeb users find useful is displayed:

Visit			
Visitor First Name Jose		Last Name Jimenez	
Visitor Phone Number (777) 777-7777			
Reason ᴬᴮᶜ new claim			
Visitor Relationship Veteran ▾			
Veteran			
Claim Related ☐			
Visit Status			
Caution ☐			
Resolution ᴬᴮᶜ			
Seen By ▾			
Office			
VSR Name			
Arrival Date 05/23/2013			
Arrival Time 17:08 PM	Time Seen		Time Completed
Information Requested by Visitor			
Comp/Pen Benefits: ☐	Widow Benefits: ☐	Education Benefits: ☐	Burial Benefits: ☐
Insurance Benefits: ☐	Housing Benefits: ☐	A and A Benefits: ☐	Other Benefit Info: ☐
Appointment: ☐	Repeat Call: ☐	Status Request: ☐	Returning Forms: ☐
Community Resource Referral: ☐	eVet Recs Referral: ☐	Referral to VA Clinic: ☐	Referral to Vet Center: ☐
Vet Connect: ☐	Employment Representative: ☐	Housing Representative: ☐	Vet Peer: ☐
Medical Benefits: ☐	Claim Follow-up: ☐	Medi-Cal Referral: ☐	Referral to VA Regional: ☐
HCA Staff: ☐			

Save Changes

This section of check boxes can be used to track non-claim related services provided to the visitor.

Seen By:

On entry of a new Visitor record, the [Seen By] field is blank by default, but a VSR may be selected from a drop-down list.

Arrival Date:

And the arrival date may be edited if necessary.

Work Flow Using Buttons below the Reception Queue Grid

The buttons below the grid deliver the Reception Queue work flow functionality.

☐	mouse	Mouse, Mickey	10:32 AM	16					5 Waiting
☐	mouse	Mouse, Mickey	10:46 AM	2					5 Waiting
☐	Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
☐	Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
☐	Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

1 - 6 of 6   First Page | Previous | Next | Last Page

[Interview] [Seen By] [Completed] [Reset to Waiting] [Vet Discovery] [Veteran Visit Log]

If the visitor has come for a claim-related purpose, the row in the grid will show the name of the veteran in the database which has been linked to the visitor, as described above. The VSR will usually select the top green entry in the Reception Queue as that visitor has been waiting the longest.

Visit Log Report

The VSR may want to review the history of previous visits for the veteran. To do so, the Service Officer will click on the checkbox at the left side of the row in the Reception Queue grid for the selected veteran. This will highlight the row – grey. Then click on the [Veteran Visit Log] button at the right end of the buttons below the grid.
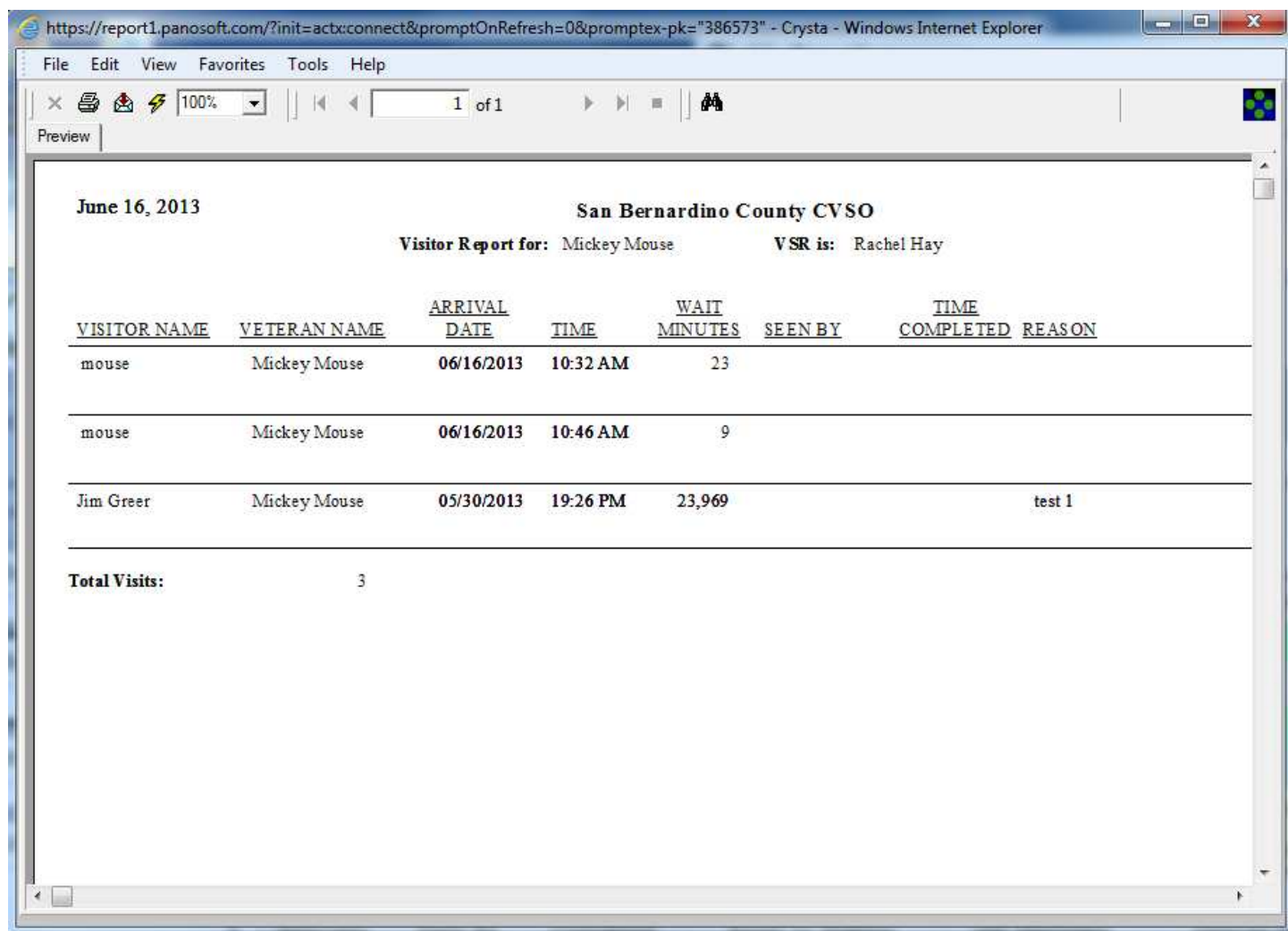
☑	mouse	Mouse, Mickey	10:32 AM	16					5 Waiting
☐	mouse	Mouse, Mickey	10:46 AM	2					5 Waiting
☐	Mickey Mouse	Mouse, Mickey M	08:24 AM	2917	TEST	09:01 AM	Claudia Frye		3 Interviewing
☐	Mickey Mouse	Mouse, Mickey M	08:24 AM	2855	TEST	07:59 AM	Art Vonwaldburg	07:59 AM	0 Completed
☐	Mousehead	Mousehead, Mickey	19:27 PM	0		19:27 PM	Art Vonwaldburg	19:28 PM	0 Completed

1 - 6 of 6   First Page | Previous | Next | Last Page

[Interview] [Seen By] [Completed] [Reset to Waiting] [Vet Discovery] [Veteran Visit Log]

A new window will open up with a report listing all visits by the veteran, most recent at the top:

That report may be printed or saved as a PDF if desired. The report can be closed by closing the report window when done.

Interview:

To begin the interview with the claim-related visitor, the Service Officer will click on the checkbox at the left side of the row (highlighting the row -- grey) … and then click on the [Interview] button:

This will stamp the visitor record with the time seen, change the status to "Interviewing", identify the user as the VSR seeing the visitor and open the veteran's folder from which other related data may be entered and VA Forms completed.

Seen By:

If the visitor has not been linked to a veteran or there is no need to conduct an interview, the visitor row in the grid may be highlighted and the [Seen By] button below the grid clicked. That click will cause the [Seen By] field in the visitor record to be filled in with the name of the user who clicked the button.

The [Time Seen] value will be time-stamped. If the user who has actually assisted the visitor was not the person who clicked the [Seen By] button, the person who clicked the button should open the visitor record and select the VSR who helped the visitor.

If the visitor has been helped and the visit is completed, the [Completed] button should be clicked to complete the record. The record may need to be opened to add a note about the resolution of the visit.

Monitoring Reception Status - Auto Refresh:

Users are able to monitor the current status of visitors in the Reception area while doing other work. The grid includes [Wait Time], which is automatically calculated as the number of minutes elapsed between the current time and the [Arrival Time]. A user may open the application to the Reception Queue grid and leave her screen on that View.

Browsers do not automatically refresh by themselves, however, so we have provided an "auto refresh" function - accessible in the top left corner of the screen:
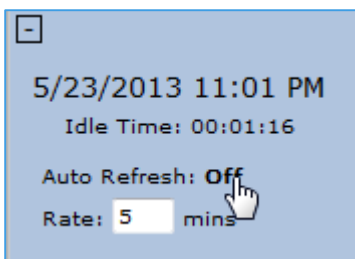
To set her screen to automatically refresh every 5 minutes, the user will change the [Rate] number to "5" and click the [Off] field. The refresh status will change to "On" and a white border around the function will blink.
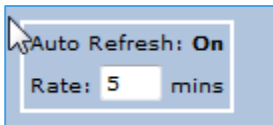
The screen (grid) will then refresh itself automatically every five minutes.   However, be aware that any activity in the browser will turn auto-refresh Off so you may need to turn it back on after doing some other activity in that browser window.

Minutes Waited:

The number of minutes waited will increase while the visitor is waiting, but remain fixed after he is seen:

Completed:

When the visitor has been helped, either in an interview or otherwise and is done, a user may select the visitor record by clicking the checkbox at the left end of the row and click the [Completed] button. This click will time-stamp the [Time Completed] value in the visitor record.

Reset to Waiting:

Administrative users will see a [Reset to Waiting] button below the grid. [Reset] will completely reset the visitor record with respect to times as if it had just been entered, however visitor name, veteran linkage, notes and other data is preserved.

This button will be visible only to administrative (and above) users.

This completes the section on the Reception Queue.

VSR Diary Report

This section describes the Tickler or "Diary" report for a VSR.

To view your Diary Report, let your mouse hover over the [User: #####] menu on the left side of the screen:
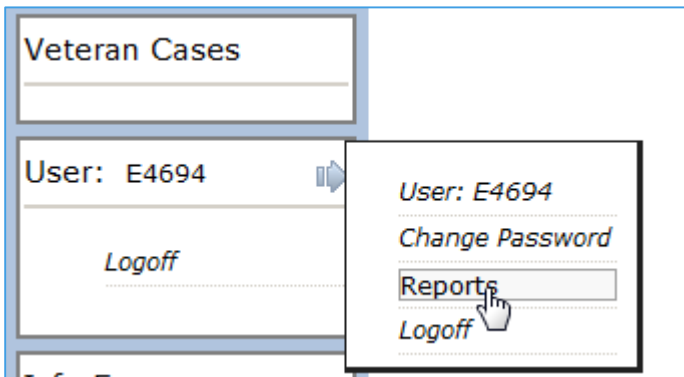
… and select [Reports].

The User Reports page will be displayed.
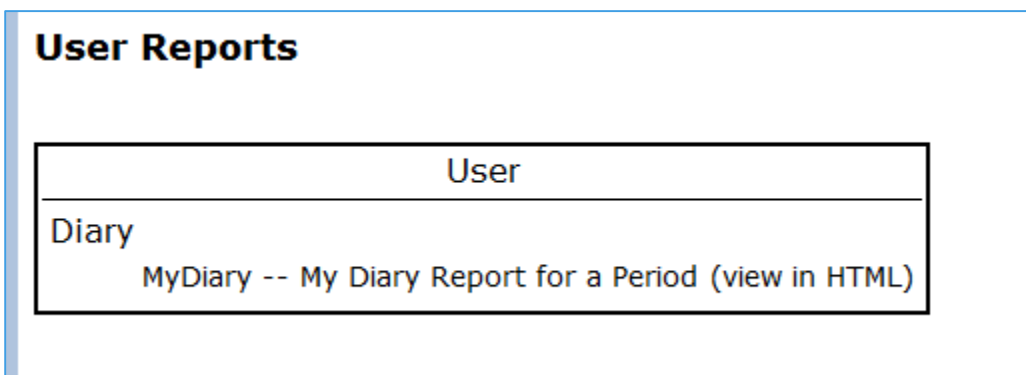
Click on "MyDiary" to produce your caseload diary report.

You will be asked to enter a date range:

And the report will be generated:
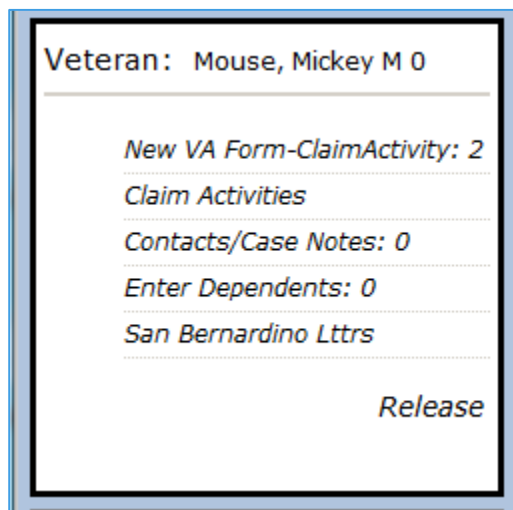
VETERAN	VETSSNUM	CLAIM DATE	FORM		DIARY DATE
6/16/2013			San Bernardino County CVSO		Page 1
			Diary Date Report for Claudia Frye		
			Diary Dates From: 1/1/2013 to: 6/16/2013		
Harrison, Craig D	548-69-3986	06/13/2012	21-526	Vet App for Comp or Pension	06/13/2013
Whitney, Merle	506-12-1774	12/12/2012	21-8416	Rqst Info Med Lgl Expenses	06/12/2013
Whitney, Merle	506-12-1774	12/12/2012	21-4138	Statement in Support of Claim	06/12/2013
Oneal, Gary L	519-58-1757	09/12/2012	21-0781	Statement in Support of SC for PTSD	06/12/2013
Melillo, Dominic O	048-34-8981	06/12/2012	21-526b	21-526b Veteran`s Supplemental Claim for Comp	06/12/2013
Mcclinton, Charles O	427-90-5764	12/12/2012	21-0847	Request For Substitution of Claimant Upon Death	06/12/2013
Casoli, John C	569-60-2259	06/12/2012	21-526b	21-526b Veteran`s Supplemental Claim for Comp	06/12/2013
Alicante, William R	546-02-8886	12/12/2012	21-686C	Declare Marital Status - SC 30% or more	06/12/2013
Whitworth, Vance C Sr	377-12-0785	12/11/2012	20-5655	Financial Status Report	06/11/2013
Ware, Caroline A	561-75-8355	12/11/2012	21-4138	Statement in Support of Claim	06/11/2013
Schindler, Leroy	353-14-2760	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Schindler, Leroy	353-14-2760	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Peruch, Joseph J	527-82-6078	12/11/2012	21-534	DIC for Spouse or Child	06/11/2013
Getz, William F	140-16-0865	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Getz, William F	140-16-0865	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Gallegos, Frederick	557-68-3577	12/11/2012	21-4138	Statement in Support of Claim	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-2680	App Aid & Attend / Housebound	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-527	Inc/NetWrth and Emplymt Stmt	06/11/2013
Dingfelder, William S Jr	184-14-7761	12/11/2012	21-4138 LTC	Statement in Support of Claim - LTC - Supporting E	06/11/2013
Caronna, Sam E	573-40-1460	06/06/2012	21-526	Vet App for Comp or Pension	06/06/2013

Veteran View Elements

This section describes the application functions available when a veteran has been selected. Most users will spend a majority of their time in the "Veteran View" portion of the application. This is where essential veteran demographic information is entered. In addition: Case notes, or "Contacts" are entered here. Claim Activities are entered under the veteran view. Award information is entered here. Information on a veteran's dependents is entered here. If a VA Form needs to be filled out, that will be done by selecting the proper form under the veteran view. If a transmittal or other form letter needs to be generated for the veteran, it will be done under the veteran view.

Veteran Navigation Element:

In most cases, a veteran is "selected" during the Reception Queue "flow". Other times, you may go directly to the veteran grid and search for the veteran of interest. Once you have selected a Veteran, the Veteran information is stored in your **Session State** and the veteran sub-navigation menu elements are displayed:

The **bold outline** of the whole navigation box indicates that we are viewing the Veteran Page.

Veteran Sub-Navigation

There are 5 sub-menu items associated with each Veteran. Four of these menu items take you to grids of records related to the specific veteran: Claim Activity Grid, Contacts Grid, Dependent Grid and the "New VA Form-Claim Activity". The "San Bernardino Lttrs" link gives you the ability to generate form letters in Microsoft Word ™ containing data from the veteran's record.

The Release menu item takes you back to the veteran grid.

The "New VA Form-Claim Activity" menu link is the primary place where a new claim activity is initiated, including creation of the VA Form linked to that claim activity.   We will describe that in detail below, however first we look at the veteran "master" demographic page.

Veteran Page:

The Veteran screen contains demographic data on the veteran including, "Personal Information", "Military Service" and "Other".

The "Personal Information" section looks like this:

Personal Information	Case ID:	1666167			
VA Claim No:		SSN: 123-12-3123	Sensitive: ▼	Sex: ▼	
Last Name: Mouse		First Name: Mickey	Middle:	Suffix: ▼	
Marital Status: ▼		Regional Office: ⇨ Select regionaloffice ▼			
Address Line 1:		Home Phone:	SC %: ▼		
Address Line 2:		Work Phone:	DOB: 📅		
City:	State:	Zipcode:	DOD: 📅		
E-Mail:		Cell Phone:			

You may use the Tab key to move from field to field. Certain fields have drop-down lists of choices to select from. The choices can be easily "customized" so just let your "VetPro coordinators" know what might be needed and we will take care of it. Date fields have a "calendar-picker". Social Security number and Phone number fields are self-formatting; you only need to enter the numbers, not the punctuation.

In VetPro, the [Sensitive] field means that the veteran's case may only be seen by Administrator-level users. It will be blank by default, but an Administrator may set it to "Yes" or "No". Once it has been set to "Yes", the veteran's record will only appear in a View called [SensitiveFiles], which is only available to Administrative users.

The Military Service section is shown below:

Military Service	Entry Date	Released Date	Serial #	Branch	Discharge	Pay Grade	Verified
1st:				▼	▼		☐
2nd:				▼	▼		☐
3rd:				▼	▼		☐

Entry Date and Release Date have calendar-pickers:
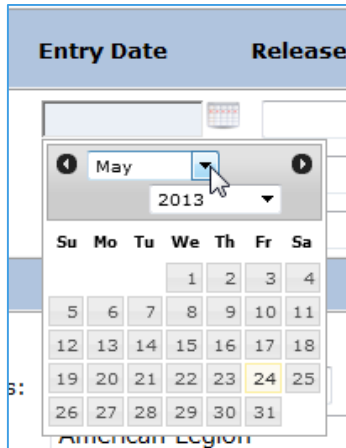
Branch has a drop-down selection, as does Discharge:
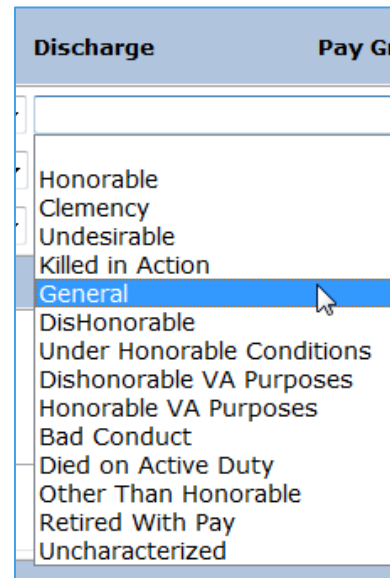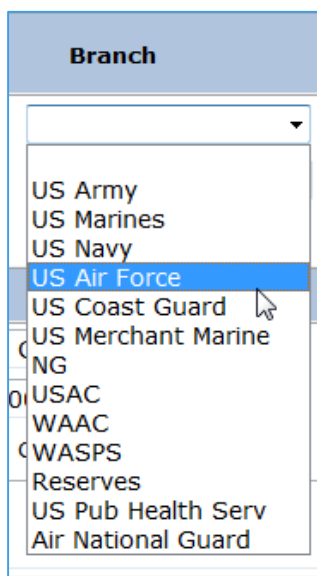
The Verified checkbox means that the information is backed up by the veteran's DD-214.

The "Other" section contains various information that is used on VA Forms so only needs to be entered once here:

The standard drop-down values are shown below. Please let us know if your requirements are different:

The POW checkbox allows you to track veterans who have been POWs:

POW: ☐

The Caution checkbox means that the veteran requires especially sensitive communications. When checked, the demographic screen will have a red border at the top to alert any VSR that may be helping this veteran:

View	Edit

View Veteran   [<--Prev--]   San Bernardino ▼   [--Next-->]

Personal Information   **Case ID:**   1621273

VA Claim No:	567592598	SSN:	567-59-2598	Sensitive:	Yes	Sex:	M
Last Name:	Mouse	First Name:	Mickey	Middle:	M	Suffix:	0

Caution: ☑

After editing the veteran demographic page, you must click the [Save Changes] button to save your data changes. The fields in the blue area are maintained automatically.

Office:	San Bernardino ▼	Entered On: 03/06/2013	Entered By:
Rep:	John Reynolds ▼	Modified On: 05/24/2013	Modified By: #Art

[Save Changes]

Inserting a New Veteran:

In some cases, you may need to enter a new veteran "manually". To insert a new Veteran, you click the "Insert" button at the top of the Veteran Grid:

The first step is to enter the new Veteran's social security number. Each veteran is required to have a unique social security number in VetProWeb.

In this example an existing social security number has been entered.

Since the entered social security number is not unique, when the "Save and Edit Full Veteran Record" button is clicked, the save function will fail and an Alert will appear.

At this point you know the veteran already exists in the database and you can return to the Veteran Grid by selecting "Veteran Cases" in the Navigation Bar on the left. (Remember that a "sensitive" case may not be in your "View". If you are entering a new Veteran and just made a typo, enter the correct social security number and click the "Save and Edit Full Veteran Record" button. If the save function is successful, you will be taken to the new Veteran record View Page. Click the Edit Tab to enter the remaining data.

Entering a New Claim Activity

When the veteran's demographic data has been entered, a new Claim Activity may be initiated by clicking the [New VA Form-ClaimActivity] link to the left of the demographic page:

The Claim Activity "grid" page will be displayed:

The first step is to click on the [Select a PDF Form – Claim Activity] drop-down. A list of possible claim activities is presented. This is a long list, listed alphabetically by form, so you can reach the form you are interested in by typing the initial part of the form name:

New VA Form-ClaimActivity

Select A PDF Form - Claim Activity:

Associated Claim Activity:

Enter A Specific Description:

Open New PDF Form
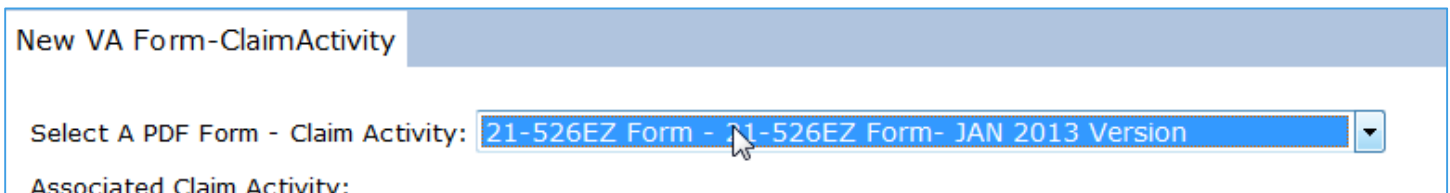
0 - 0 of 1   First Page |

☐ 🖹   ⬆ Form Name

☐ 📝 21-526b Veteran`s Suppleme

0 - 0 of 1   First Page |

Delete

21-0847 Substitution of Claimant - 21-0847 Request For Substitution of Claimant
21-0958 Notice of Disagreement - 21-0958 Notice of Disagreement
21-22 Appoint CDVA as POA - Appointment of Veterans Service Organization
21-22 Appointment of Veterans Service Organization - Appointment of Veterans Service Organization
21-2680 Exam for Hsebnd Status or Need for A & A - Exam for Housebound Status or Need for A & A
21-4138 - Statement in Support of Claim - Statement in Support of Claim
21-4138 - Fiduciary - 21-4138 - Fiduciary
21-4138 - Incompetency Rating - Due Process Waiver for Incompetency Rating
21-4138 - Incompetency Rating - Due Process Waiver for Incompetency Rating
21-4138 -Statement to Secure Effective Date - FDC - Statement to Secure Effective Date
21-4138 - VA Benefit Letters - 21-4138 - VA Benefit Letters
21-4138 CF Statement in Support of Claim - Statement in Support of Claim
21-4140 Employment Questionnaire - Employment Questionnaire
21-4142 Form - Consent to Release Information
21-4142 Form With POA Address - 21-4142 with POA Address Dropdown
21-4170 Statement of a Marital Relationship - Statement of a Marital Relationship
21-4171 Supporting Statement Regarding Marriage - Supporting Statement Regarding Marriage
21-4185 Income from Property or Business - Income from Property or Business
21-4192 Reqst for EmployInfo in Connect w Claim - Request for Employ Info in Connection with Claim
21-4502 Automobile or Adaptive Equipment - Automobile or Adaptive Equipment
21-4706b Federal Fiduciary - Federal Fiduciary`s Account
21-509 Statement of Dependency of Parent(s) - Statement of Dependency of Parent(s)
21-526 Form - 21-526 Revised Form ($0 auto fill)
21-526 Form - 21-526 Revised Form
21-526b Veteran`s Supplemental Claim - Veteran`s Supplemental Claim
21-526c Pre-Discharge Compensation Claim - Pre-Discharge Compensation Claim

In this screen shot, we have typed "21-526 …"   Scrolling down from there takes us to the 21-526EZ.

Clicking on that form name will fill the "selection".
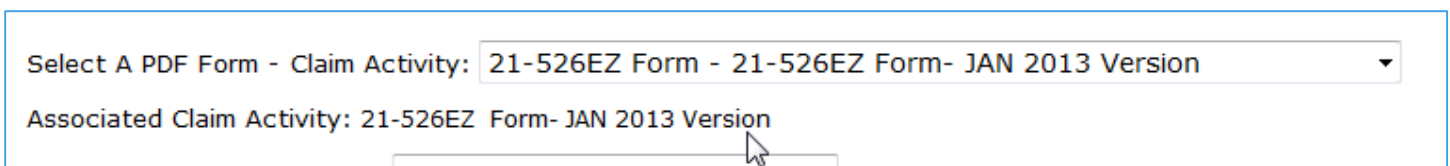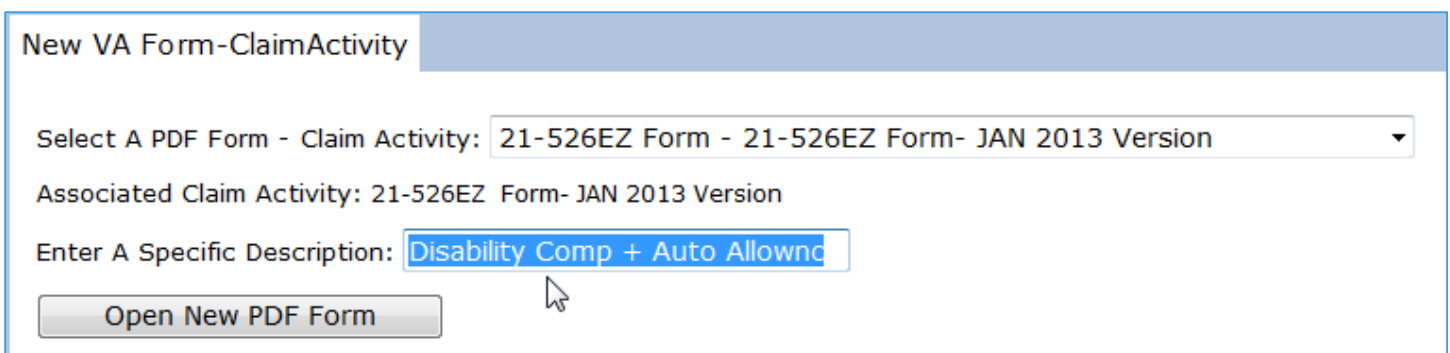
Clicking out of the selection, will display the associated Claim Activity linked to the selected form:

Next, add a short description of the reason the form is being filed:

Then click the [Open New PDF Form] button.

The VA Form will be opened and the veteran demographic data will be auto-filled:

You may click into the fields on the form and fill them in. Use [Tab] or click to navigate through the fields.

When the form has been completed, click one of the [Save Form] buttons you will find at the top or bottom of a page:

You will be returned the VA Form-Claim Activity grid and the new form will be at the top of the grid (the 21-526EZ is highlighted below):

For reference, this "location" is a place to see all of the VA Forms that have been filed for this veteran. Each VA Form is also associated with a Claim Activity.

The [Form Tag] is a short description of the reason the form was filed. It may be changed after the form has been saved by highlighting the row and clicking the [Change Tag] button.

Enter the new text and click the [OK] button.

After filling in the VA Form, click on the [Claim Activities] menu link on the left to open the grid of all Claim Activities created for this veteran. The list of Claim Activities and the list of VA Forms are the same, but the Claim Activity grid below is focused on tracking everything about the claim itself.

The most recent activity is at the top. Clicking on the 21-526EZ gives us the Claim Activity page. There are several parts to the screen, which is displayed on the next page:

This is the place where nearly all information about the claim is tracked. Each section of the page is described below.

The top two sections are informational only:

The veteran information is for reference. The Claim Activity is the one chosen when the VA Form was filled in. Information that is relevant to the DVS-19 "audit report" is displayed for reference below. Note that a "Medi-Cal" claim is only valid if the veteran has an auditable AidCode on record.

The next section has additional information about the Claim Activity:

The Activity Date was set when the VA Form was created but this date can be changed. The Entry Location is the location the user was in when logged in to create the VA Form.

A Claimant/Dependent can be selected from a drop-down list of dependents entered for the veteran.

The Claim Note is a short description of the Claim Activity. The default value can be edited.

Claim Note	Fully Developed Claim (Compensation) ... this can be edited

The Claim Status defaults to "Pend" ing but can be manually changed if appropriate:

Claim Status	Pend ▼
	Pend
	Denied
	Done
	Rating Decision

View Attached PDF Form

If award information is entered (below) the status will be automatically changed to "Awarded".

The Suspense (Diary) Date may be edited:

Suspense Date	05/24/2014 📅	Defer

◀	Jul	▼	▶
	2014 ▼		

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

The next two sections give access to the VA Form that was created when the Claim Activity was created and allow you to enter award information:

Clicking on the [View Attached PDF Form] button opens the form:

Use your browser's back arrow to return to the Claim Activity record.

The Award information that is tracked consists of

The Post Date: The date the award information is posted in the database.

The Award Date: The Effective Date of the award.

The Letter/Decision Date: The date the VA generated the Award Letter.

If there is an updated disability rating, the new information can be entered here.

For each type of Claim Activity, only certain types of monetary awards are possible. In the case of the 21-526EZ both Retro and Monthly amounts may be awarded. The award amounts can be entered here. For other claims, only a Lump Sum award may be obtained. For a CW-5 only a Prior Award Verified may be entered. The award fields are editable or not based on the Claim Activity to protect against errors.

Attaching Documents to a Claim Activity

While we have the Claim Activity record open:

We notice a sub-navigation link on the left side of the screen:

This is the link that allows us to attach all electronic files we may collect that are relevant to this claim.

Click on the [Attach Documents] link to open up the grid of attached documents:

In this example there is already one document attached. Clicking on that row of the grid will open up the attached document so we can view it.

To attach a new document, click on the [Insert] button at the top right of the grid. That opens the attach documents dialogue:

There are a large number of category choices:

Select a category, then enter a "transaction date" and a description of the document to be attached.

Then click on the [Browse] button to open the file dialogue:
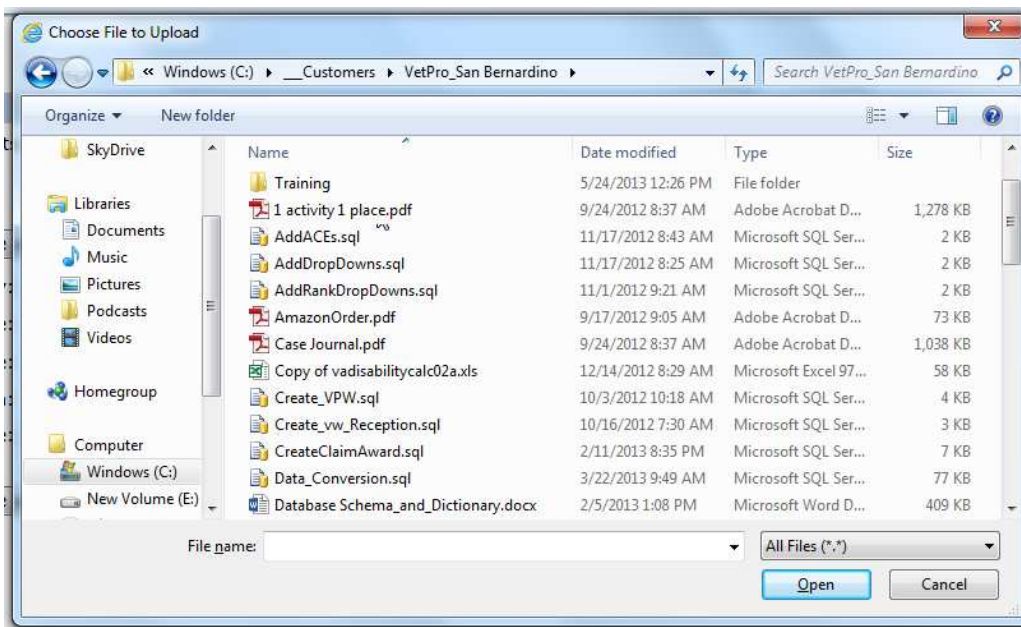
Double-click on the file you want to attach and click [Save]. The file will be uploaded to VetPro and show up in the attached documents grid for this Claim Activity.

Clicking on the row in the grid will open the document for you to review, print or even save locally.
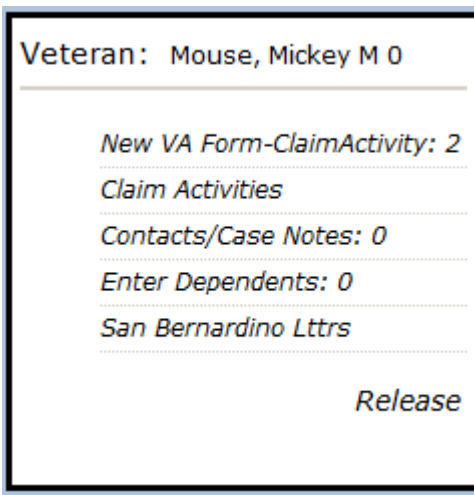
Other Functions in the Veteran Context

We have covered the creation of a new Claim Activity and entry of the associated VA Form. We have discussed the Claim Activity screen for tracking all aspects of the Claim itself and the process for attaching electronic files to the Claim Activity record.

Veteran: Mouse, Mickey M 0

New VA Form-ClaimActivity: 2

Claim Activities

Contacts/Case Notes: 0

Enter Dependents: 0

San Bernardino Lttrs

Release

We will now discuss entering case notes, adding dependents and creating a transmittal letter for the claims package.

Contacts or Case Notes

The Contacts table contains a record, or case note, for each "contact" that was made with the veteran or on behalf of the veteran.   Open the Contacts grid by clicking on the "Contacts/Case Notes" link on the left side of the screen:

The grid page will open:

Click the [Insert] button to open a new case note:

Select the appropriate Type of Contact and enter the Location if appropriate. Enter the Contact Date, which will default to "today".

If you would like this note to appear in your Contact Tickler Report, enter a "due date" as the Tickler Date.

Enter as lengthy a Contact Memo as necessary to document your work. And, click [Save] to save the case note.

Dependents

The Dependents table contains a record for each spouse or child or otherwise dependent person of the veteran. The reason to enter the dependents (other than for reference) is to be able to have their information "auto-filled" on VA forms.

Open the Dependents grid by clicking on the "Enter Dependents" link on the left side of the screen:

The grid page will open:

Click the [Insert] button to open a new dependent record:

Veteran Cases

Insert Dependent

(Red indicates required field)

Save   Save and Re-Insert

Veteran Information

Veteran Mouse, Mickey M 0   SSN 567-59-2598   File Number 567592598

Dependent Information

First [ ]   Middle [ ]   Last [ ]

Relationship [▾] Rep [John Reynolds ▾] POA [▾]

cc: College [ ]   Academic Yr: [ ]

Address [1300 Harbor Blvd.]
: [ ]
: [Anaheim]   [CA] [92215]

Phone [ ]   Email [ ]

SSN [ ]   Unverified SSN ☐   Surv Spouse ☐   NextOfKin ☐

Birth Date [ ] 🗓   Birth Certificate on File: ☐
Birthplace [ ]   Death Date [ ] 🗓

Marriage Date [ ] 🗓   Marriage Cert. on File: ☐
Marriage Place [ ]
Marriage Ended [ ] 🗓

The first and last names, the relationship to the veteran and the dependent's SSN must be entered to save the record.

The Relationship field is a drop-down with a large number of selections. The POA field also has a large number of service organizations as selections. If the dependent is a college student, enter the college and the current academic year of enrollment.

The address will default to the veteran's address.

When the record is completed and saved, the dependent will be available as a selection for "Claimant" on a Claim Activity record.

Creating a Transmittal Letter

Form letters are available under the link called "San Bernardino Lttrs". When the link is clicked, the page of form letters will be displayed:

Only one sample letter has been created at this time: A transmittal cover letter to the CDVA representative at the Los Angeles VA Regional Office.

Clicking on the link to the letter will cause Microsoft Word ™ to be opened on your desktop and the form letter loaded with the current veteran's information inserted appropriately.

COUNTY OF LOS ANGELES
DEPARTMENT OF MILITARY AND VETERANS AFFAIRS
2615 South Grand Avenue, Suite 100
Los Angeles, California 90007

United We Stand

Ruth A Wong
Director

05/25/2013

CA Department of Veterans Affairs
PO Box 24010
11000 Wilshire Blvd
Los Angeles, CA 90024

RE: Mouse, Mickey M 0
SSN: 567–59–2598
C#:   567592598
ADDRESS: 1300 Harbor Blvd.
                    Anaheim, CA 92215
PHONE: 9092000507

To Whom It May Concern:

Please find attached documents regarding claim for the veteran referenced above:

( ) 21-526   ( ) 21-4138
( ) 21-22   ( ) 21-686C
( ) Medical Evidence   ( ) 28-1900
( ) DD-214   ( ) 21-530
( ) 21-534   ( ) 21-4142
( ) VCAA Notice

Thank you in advance for your assistance with this claim.

Sincerely,

Art Vonwaldburg
(415)925–9935
Veterans Service Officer

This sample letter was a copy of a Los Angeles CVSO cover letter and is on their stationery.

This concludes the User Training Guide.